



## User Guide

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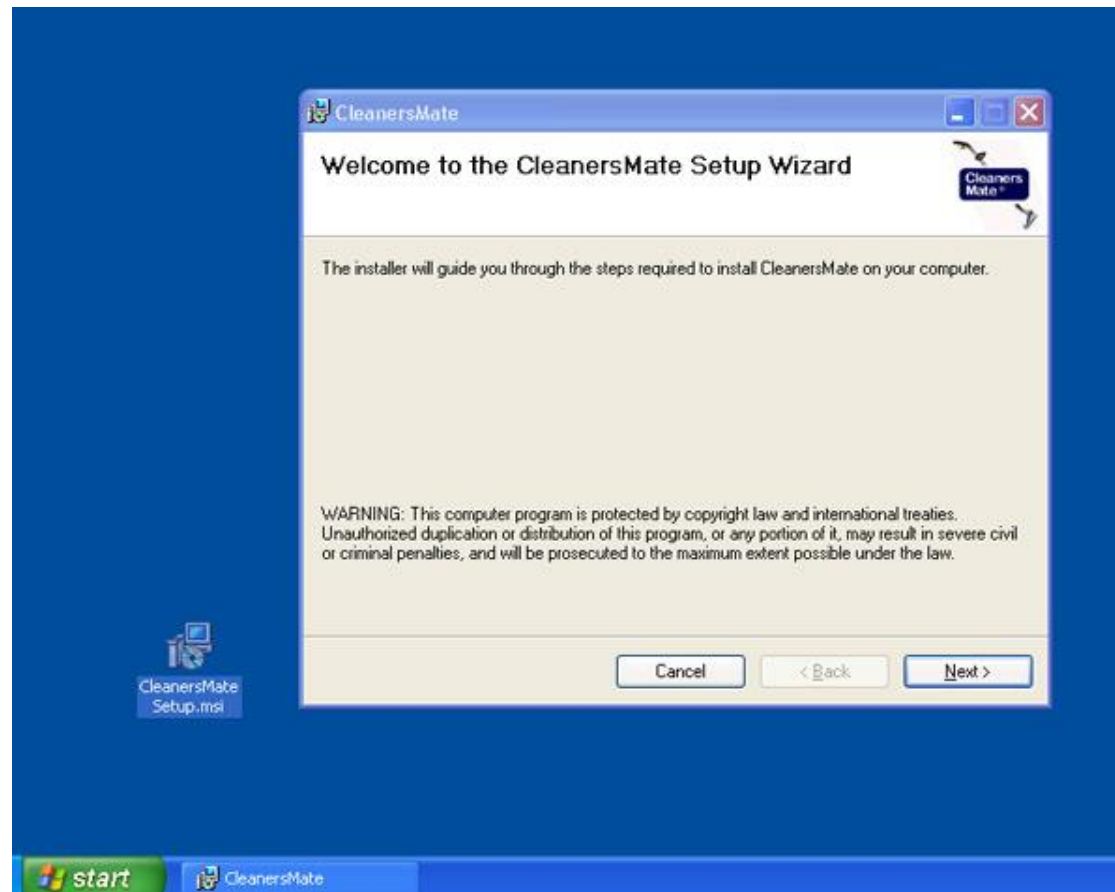
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## Installation

Download your copy of CleanersMate and save it to your desktop.

Open the .zip file and copy the 'CleanersMateSetup' to your desktop

Double-click to run the installer; 'CleanersMateSetup'



- Follow the on-screen instructions.
- Please ensure you read and understand the EULA (End User License Agreement') you must accept this agreement to continue with installation of the CleanersMate program.

After installation you can find a link to the program on your desktop, and in your Start Menu → Programs → CleanPro → CleanersMate

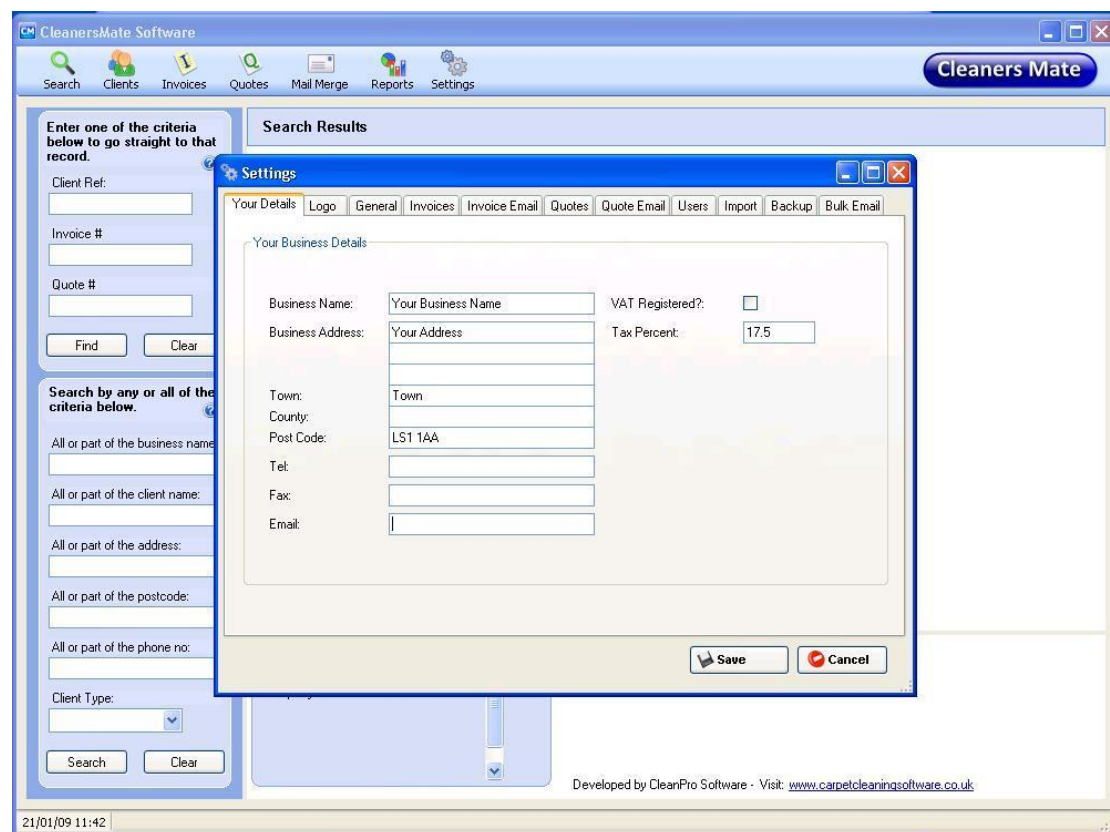
When first running the CleanersMate software you will automatically start your free 30-day trial period.

Click 'Continue Evaluation' to enter the software and instantly start using CleanersMate.

# Using CleanersMate

## Initial Settings

When you first use the CleanersMate Software you should click on the 'Settings' button, and enter your business information into the spaces provided on the 'Your Details' tab. (The Information you enter here is required for printing Invoices)



The screenshot shows the CleanersMate Software interface. The main window has a toolbar with buttons for Search, Clients, Invoices, Quotes, Mail Merge, Reports, and Settings. A 'Cleaners Mate' button is also present. On the left, there is a search section with fields for Client Ref, Invoice #, and Quote #, and a 'Find' button. Below this is a section for searching by criteria, with fields for business name, client name, address, postcode, phone number, and client type, along with 'Search' and 'Clear' buttons. The 'Settings' dialog box is open, showing the 'Your Details' tab. It contains fields for Business Name, Business Address, Town, County, Post Code (pre-filled with 'LS1 1AA'), Tel, Fax, Email, VAT Registered? (checkbox), and Tax Percent (pre-filled with '17.5'). There are 'Save' and 'Cancel' buttons at the bottom of the dialog box. The status bar at the bottom of the main window shows the date and time: 21/01/09 11:42.

Click on the 'Save' button to save the information you have entered.

You are now ready to start using the CleanersMate software.

## Clients



To begin working with Client records click on the 'Clients' button on the top toolbar.

When you have clients entered they will appear in a sortable list for quick access.

## Clients Summary Screen

The Clients Summary gives you an overview of all the Clients in the system. You can see the total number of Clients you have, you can add a new Client, edit an existing Client or Delete a Client.

Each column in the display is sortable by clicking on the grey tab at the top of each column.

Reference	Last Name	First Name	Address 1	Town	Post Code	Type	Home Tel	Work Tel	Mobile
CM00001038	Carpet	Wanda	76 Barber Lane	Shopton	AX4 5PL	Domestic			
CM00001037	Dirty	Isa	2 Dirty Water Lane	Ditwille	GB5 7YH	Domestic			
CM00001036	Mcathree	Stella	Gold House	Chuppa	BG6 1TE	Domestic			
CM00001035	Daniels	Paul	75 Joker Hall	Magic Kingdom	CD5 3ED	Domestic			
CM00001034	Jackson	Michael	12 Offthelwall	Delles	JC45 8TF	Domestic			
CM00001033	Springfield	Dusty	45 Record Lane	Plangton	BG6 4RD	Domestic			
CM00001032	Humpadink	Englebert	Flash House	Planoton	FJ6 8UH	Domestic			
CM00001031	Down	Ida	28 Bedinen Rd	Batford	6TF 8UH	Domestic			
CM00001030	Down	Neil	23 Crouch Lane	Backton	BD4 6TY	Domestic			
CM00001029	Dirvis	Betty	Blackbird House	Blackpool	BG6 8UH	Domestic			
CM00001028	Flash	Harry	88 Floppy Lane	Rapjack	KJ8 6TF	Domestic			
CM00001027	Yeksin	Boris	666 Canveup St	Harvard	HG6 9UJ	Domestic			
CM00001026	Dash	Gutta	135 Runner Lane	Quickton	JH6 7YH	Domestic			
CM00001025	Gobby	T	99 Mouthy Gdn	Trapton	MK67 3UH	Domestic			
CM00001024	Therhide	Lee	65 Tannery Rd	Anline	AY4 6BC	Domestic			
CM00001023	Laughs	Leurs	16 Hippy Hill	Hopton	GH5 7YV	Domestic			
CM00001022	Cross	Chris	88 Chalk Hill	Chapstow	HA6 4RF	Domestic			
CM00001021	Bolton	Barry	345 High Rd	Spanneron	TO6 9IH	Domestic			
CM00001020	Catonas	Kerry	66 Druggy Lane	Loctit	DR4 6RF	Domestic			
CM00001019	Offalot	Nicci	90 Drury Lane	Soho	W14 7YH	Domestic			
CM00001018	Hastbeen	H	34 Lonely Rd	Bognor	HG6 9UY	Domestic			
CM00001017	Wayne	John	89 Rodeo Drive	Hickston	AL8 7UL	Domestic			
CM00001016	Day	Dots	67 Hollywood Drive	Luton	LU4 6PL	Domestic			
CM00001015	Hill	Harry	78 Laughing Rd	Pottford	GH8 8UG	Domestic			
CM00001014	Duckworth	Vera	12 Coronation St	Leeds		Domestic			

### Adding a New Client

From the Clients Summary click on the 'New' button to open a blank screen to enter a new Client

### Deleting an Existing Client

From the Clients Summary select a Client in the list and click on the 'Delete' button, you will be asked to confirm your choice to delete a Client.

**Note: Deleting a Client will cause ALL data associated with that Client to be deleted. This includes Invoices and Quotes. This action will permanently delete the Client, and cannot be undone.**

### Editing an Existing Client

From the Clients Summary select a Client in the list and click on the 'Edit' button to open the Clients Screen.

You can also edit a Client by 'Double Clicking' the selection in the list, or 'Clicking' the magnifying glass icon on the right of the Client row.

## Clients Screen

### Entering Client Details

When Opening the Client Screen you are presented with a form for entering and editing your Client's information.

The screenshot shows a software window titled "Client" with a menu bar (New, Delete, Email, Invoices, Quotes, Letter) and a toolbar with icons for each. The form contains the following fields:

- Business Name: [ ]
- Title: Mr [v]
- First Name: Indiana
- Last Name: Jones
- Address 1: Some Street
- Address 2: Someplace
- Address 3: [ ]
- Town: Some Town
- County: [ ]
- Post Code: S11 1WR [View Map]
- Client Reference: CM00001
- Home Tel: [ ]
- Work Tel: [ ]
- Mobile: [ ]
- Email: Indiana@jones.com [ ]
- Client Type: \* Domestic [v]
- Source: \* Newspaper [v]
- Created on: 17 January 2009 [v]
- No Mail: ☐ Exclude Clients from future bulk mail when using the Mail Merge feature.
- Notes: [ ]

Below the form is a tabbed interface with "Invoices", "Quotes", and "Marketing" tabs. The "Invoices" tab is active, showing a toolbar (Add, Open, Print, Email, Copy) and a table:

Invoice No	Invoice Ref	Created	Services	Terms	Total
1001		17 January 2009	Curtain Cleaning	7 Days	£150.00

At the bottom of the Invoices section, it says "Total Spend: £150.00". At the very bottom of the window are "Save" and "Cancel" buttons.

From the fields available on this screen you must complete either, Last Name or Business Name, Client Type and Source. The Client Type and Client Source are used for your reference and Reporting purposes.

### Adding a New Client

The Client Screen allows you to add a new Client, by clicking the 'New' button, and delete the existing Client by clicking the 'Delete' button.

### Email a Client

If you have entered the Client's email address you can send an email directly to the client by clicking either of the Email buttons.

## **Saving a Client**

Click the 'Save' button to save any details entered or changed on the Client Screen. To cancel any changes and close the Client Screen click the 'Cancel' button.

## **Sending a Letter**

From the Client Screen you can also send a letter via mail merge to that Client by clicking the 'Letter' button.

## ***Client Invoices***

This system allows you to create both Invoices and Quotes for a selected Client. The process of adding and editing a Quote is exactly the same as the Invoicing process.

There are two ways of accessing Invoices from the Clients Screen. You can use the buttons on the top toolbar, or you can use the tabs with Invoice summaries at the bottom of the Client Screen.

On the top toolbar of the Client Screen clicking the 'Invoice' button will take you to the Invoice Screen.

If there are no Invoices added yet for the selected Client then you will be taken to a new Invoice screen to enter a new record,

If there are existing Invoices, you will be taken to the first one in the list. (You can use the navigator on the top of the Invoice Screen to view all the invoices for a Client)

From the lower Invoice Summary tab you can preview a list of Invoices for the Client.

To open a selected Invoice from the list you can 'double-click' the row, select the row and click the 'Edit' button, or click the magnifying glass to the right of the selected row.

## **Copy an Invoice**

This system allows you to save time by copying an existing Invoice.

To copy an existing Invoice, select the Invoice to copy in the Invoice summary list, and click the 'Copy' button. This will add a duplicate Invoice to your Invoice summary list. You will need to edit this copied Invoice to alter the contents to your satisfaction.

## **Print an Invoice**

From the Client Screen you can directly print an Invoice by selecting the required Invoice in the summary list, then clicking the 'Print' button.

When you have the Invoice preview screen displayed you can print the Invoice by clicking the 'Printer' button at the top of the Invoice Preview.

You can also choose to save a copy of your invoice in acrobat (.pdf) format by clicking the 'Export Report' button at the top left of the Invoice Preview, you can also save as a Word document if you have Microsoft Office installed.

## Email an Invoice

From the Client Screen you can email an Invoice to a Client (providing they have an email address supplied) by selecting the required Invoice in the summary list, then clicking the 'Email' button.

(You will need an email client configured on your computer to successfully send emails – you cannot send an email through web-based email clients)

*If you experience problems using the MAPI email service please try exporting the invoice, as detailed above and attaching it manually to an email.*

## Client Quotes

See Client Invoices...

## Invoices



This system allows you to create both Invoices and Quotes for a selected Client. The process of adding and editing a Quote is exactly the same as the Invoicing process.

Once you have created a Client you can create an Invoice for that Client.

Invoices can be set up with multiple services, multiple quantities per service, and an easily editable description per service.

You can easily speed up your invoice creation by using the services template items. The system comes with some default services that you can edit or add to.

Each service template allows you to add a cost and description as a default that you can then edit on a per-invoice basis.

## Adding an Invoice

You can add a new Invoice in three ways with this system:

### From the Invoices List

On the Main screen of the system, click the 'Invoices' button, to see a list of existing Invoices. From the button menu at the top of the list, click the 'New' button to add a new Invoice. You will first be presented with a Client Selection screen that you can select a client to create a new Invoice for. Click on a Client in the list, and press the 'Select' button to go to





a new (blank) Invoice for the selected Client.

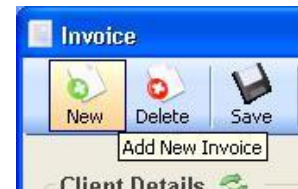
### **From the Client Screen**

When you are viewing a Client, select the Invoice tab at the bottom of the Invoice Screen and then press the 'Add' button to be presented with a new (blank) Invoice for the selected Client.



### **From the Invoice Screen**

From the Invoice screen, if you are viewing or editing existing Invoices, you can add a new Invoice for the selected Client by clicking the 'New' button on the top button toolbar.



### ***Adding a Source for each invoice***

The invoice feature has by default a Source entry that must be made for each individual invoice. This is because the reports feature relies on this data to give you the right information. In other words, when you market your clients you need to know what marketing method has worked each time i.e. did the client ring you because of the type of letter you sent them, or was it by a reminder card etc or any other form of marketing? You will then be able to very quickly determine what marketing method works best.

### ***Editing an Invoice***

You can open an Invoice for Editing from the Invoices list on the Main screen by selecting an Invoice in the list and clicking the 'Edit' button, or by double clicking the Invoice in the Invoices List.

You can also open an Invoice for Editing from the Clients Screen by selecting an Invoice from the Invoices List on the Invoices tab at the bottom of the Clients screen and clicking the 'Open' button, or by double clicking the Invoice in the Invoice List.

**Invoice**

New Delete Save Print First Prev. 1 of 1 Invoices Next Last

**Client Details**

Mr Indiana Jones  
Some Street  
Someplace  
Some Town  
S11 1WR

**Invoice**

You can edit the lines in this box.  
The address shown here is what appears on your invoice/quote.

Invoice No: 1001

Our Ref: RefTmplDm

Client Ref: CM00000

Source: \* Yellow Pages

Created: 17 January 2009

17 January 2009

7 Days

**Services**

Add Edit Delete

Service	Description	Qty	Unit Price	Amount
Curtain Cleaning	Curtain Cleaning Description	1	£150.00	£150.00

Invoice Comments: A Short Comment to appear on the Invoice

Internal Notes: (Does not appear on Invoice) Some extra notes specific to this Invoice, that only I can see.

Sub Total: £150.00

Delivery Charge: 0.00

Vat: £0.00

Total: £150.00

Save Cancel

The Invoice screen allows you to view/create/edit an Invoice for your selected Client.

You can navigate through all the Invoices entered for the Selected Client using the arrow buttons at the top of the screen.

You can delete an Invoice by clicking the 'Delete' button at the top of the screen.

**Note: Deleting an Invoice (and associated Services, is an action that cannot be undone!)**

Complete the standard information on the top right of the Invoice screen. The Created and Sent dates are automatically entered, as are your Client Reference and Client Address. All automatically entered data is editable by you.

The 'Sent Date' is the date that will appear on your Invoice. This allows you to create you Invoices in advance and print them with the current date at a later time.

After adding Services to your Invoice, the System will automatically calculate your Invoice Total, and any VAT due. (VAT is calculated only if you have the VAT checkbox ticked in the System 'Settings')

## Invoice Services

To add services that you have provided to your Client click the 'Add' button on the Services toolbar in the middle of the Invoice Screen.

To Edit a service you have added to your Invoice, select the Service from the Service List (on the Invoice Screen) and click the 'Edit' button, or double click the Service in the Service List.

To Delete a service from the Invoice, select the Service from the Service List (on the Invoice Screen) and click the 'Delete' button, or double click the Service in the Service List, then press the 'Delete' button on the Services Screen.

The screenshot shows the 'Add/Edit Services' window. The toolbar at the top includes 'New', 'Delete', 'Save', 'First', 'Prev', 'Next', and 'Last' buttons. The status bar indicates '1 of 2 Services'. The main form area contains the following fields and buttons:

- Service:** A dropdown menu showing 'Curtain Cleaning' and an 'Edit Services' button.
- Invoice Details:** (This will appear on the invoice) A text area containing 'Curtain Cleaning Description'.
- Service Price:** A text box showing '£150.00' and a 'Clear Service Details' button.
- Quantity:** A spinner box showing '1'.
- VAT:** A text box showing '£0.00' and a label '@17.5%'.
- Total:** A text box showing '£150.00'.
- Gross Total:** A text box showing '£150.00'.
- At the bottom right, there are 'Save' and 'Cancel' buttons.

### Add a Service

When you are adding a Service that you have provided, to your Invoice, you are presented with the blank Service screen.

To add a Service you must pick one from the dropdown list (If you wish to add a new service to the dropdown list, please click the 'Edit Services' button)

Picking a service from the list provided would add the basic service details to the screen: Service, Description, Service Price and Quantity. The system is set up to make generating Invoices as easy as possible by using the Service Templates in this way.

You can edit the selected details for that particular Invoice, before clicking the 'Save' button to return to the main Invoice Screen.

If you have changed details but do not want to save your changes, click the 'Cancel' button to return to the main Invoice Screen, without saving your changes.

### **Delete a Service**

To delete a service from an Invoice from the Invoice Screen, select the service from the Services List, and press the 'Delete' button on the toolbar directly above the Services List.

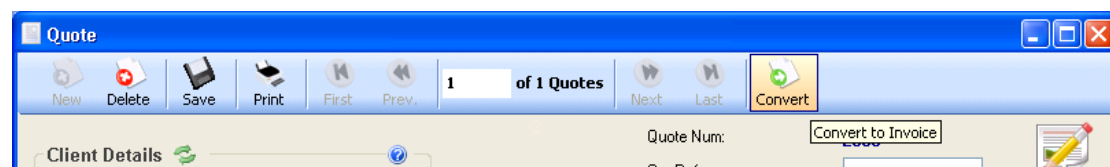
To delete a Service from the Services Screen, press the 'Delete' button at the top of the Service Screen to delete the current Service. The screen will automatically display the next Service for the Selected Invoice. If there are no more Services to be displayed the System will return you back to the Invoices Screen.

## **Quotes**

On this System the Quotes work in the same way as Invoices. Please see the Invoices section above for details of how to add a Quote.

### ***Converting a Quote***

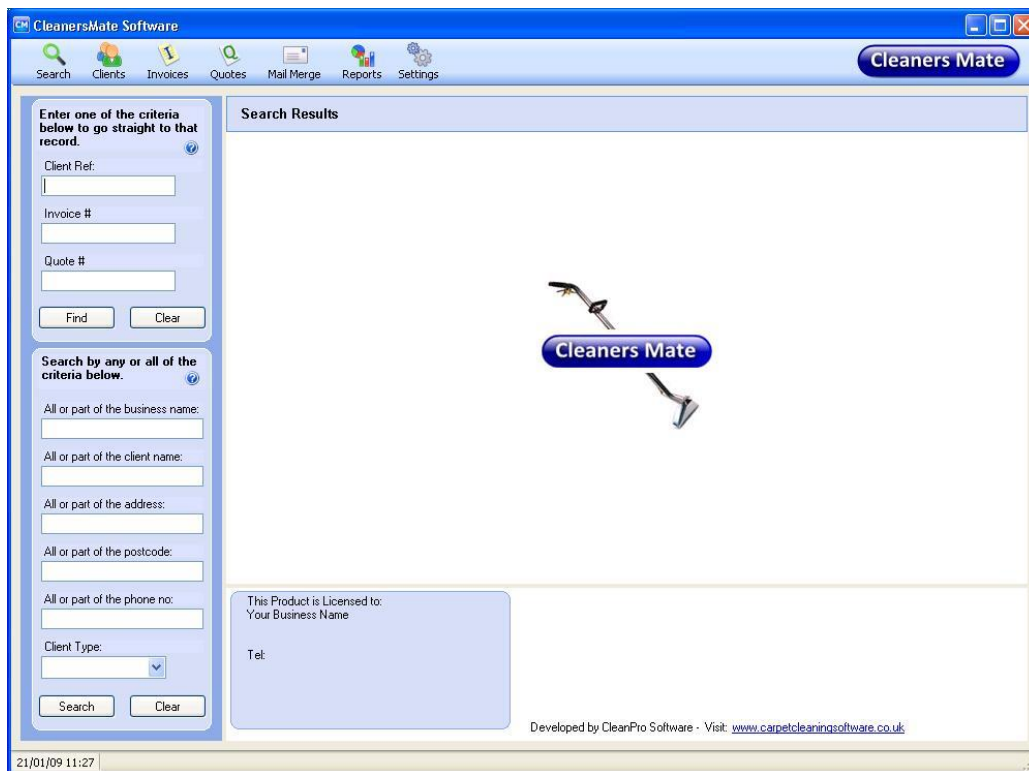
Once you have created a Quote, you can convert it into an Invoice by clicking the 'Convert' button on the top toolbar of your Quote Screen.



Close the Quote Screen and if you have not already, open your Client Screen and view the newly created invoice in the Invoices List, or find the New Invoice in the Invoices List on the Main Screen.

## **Search Screen**

On the Main Screen of the System you are presented with a number of search fields to help you find the Item you are looking for.



## ***Quick Find***

At the top left of the Search Screen you can enter Client Reference Number, Invoice Number or a Quote number to quickly find and open the Screen corresponding to the Number you entered.

This allows you to quickly access the information you need when answering a client query or looking up an Invoice or Quote.

## ***Advanced Search***

To the bottom left of the Search Screen is a number of boxes allowing you to perform a detailed search for one or more Clients matching the search parameters entered.

You can search for all or part of your specified search term, by entering more or less information. (e.g. To find all Clients with a Surname like Smith, including Smythe and Smithy, just enter the letters 'Sm' into the Name search field. To find all Clients in a particular Phone Code area, just enter the code into Phone Number field.)

# Mail Merge

The Mail Merge Screen allows you to do a detailed filter of you existing Clients to allow you to market to them more efficiently.

ClientRef	BusinessName	Title	FirstName	FirstInitial	LastName	Address1	Address2	Address3
CM000008		Mrs	Alison	A	Ber	House	Hill	
CM000085		Mrs			Boltho	22	A...	
CM000094		Mrs	C A	C	Box...			
CM0000152		Mr			Chart	1	Close	Waltham Cross
CM0000175		Mrs	Sally	S	Cock		Ilford	
CM0000186		Mr			Coll	Aven...	Cheshunt	
CM0000249		Mrs			Dit		n Road	Barnet
CM0000347		Mrs	S	S	Grade	13	Gar...	Finchley
CM0000385		Mrs			I'		Poles	Hanbury Drive
CM0000399		Mrs			Heaj	591	Cres...	
CM0000405		Mrs			I'		Lane	
CM0000486		Mrs				The		Hemel Hempstead
CM0000662		Mrs			North		Wood	Barnet
CM0000710		Mrs	J	J	Pick...		Drive	

There are several criteria available by which you can narrow down your results to keep you Mail Merges highly targeted.

You must select one of the Client Types from the list on the left, and then you can select one or more of the various options available, and press the 'Refresh List' button to view a summary of the criteria you have entered, and a list of the matches found.

**Note: Clients will not appear in this list if they have the 'No Mail' checkbox ticked in their Client Screen. This prevents you from sending information to Clients who have specifically requested no further mailings from you.**

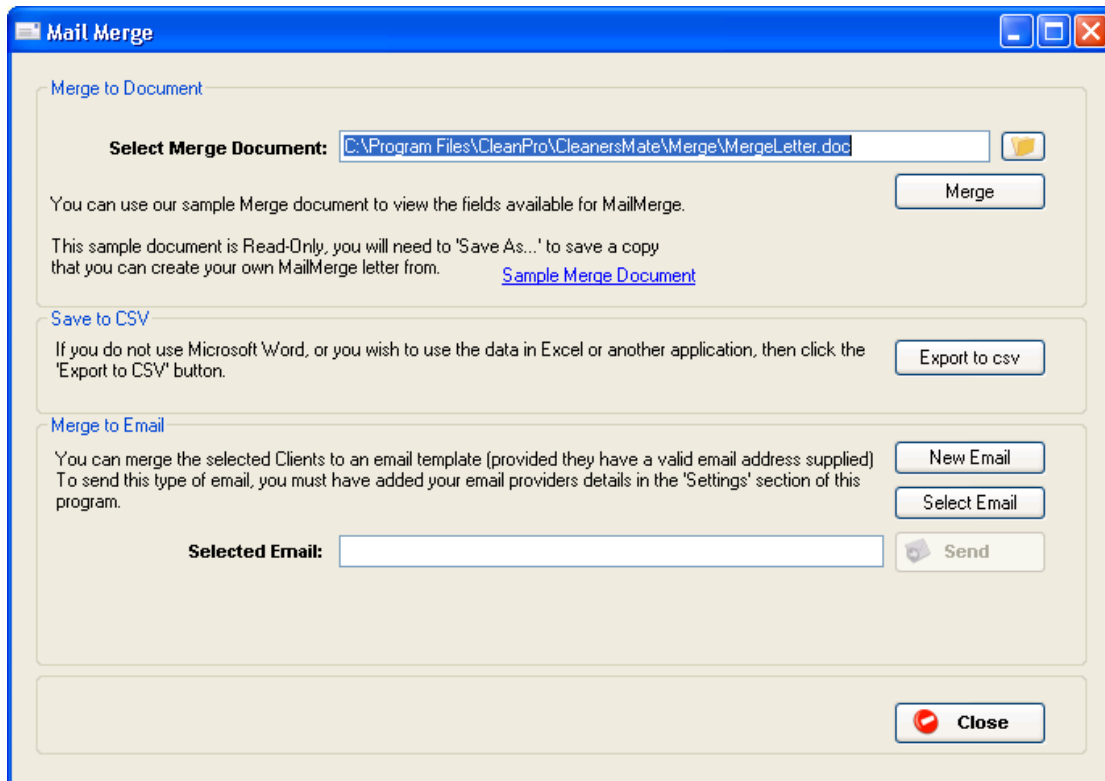
Once you have selected the required Clients by using the filtering options, you can click the 'Merge' button at the bottom right of the Mail Merge Screen to begin your Mail Merge.

On the following Screen you have multiple options for sending information to your Clients.

## Merge Screen

Upon clicking the 'Merge' button from the Mail Merge Screen you are presented with the following options in a pop up window.

You can Merge your selected Clients to a Word Document (*you will need Microsoft Office 2000 or later to perform this action*), create a csv file that can be opened in Excel or imported into other programs such as Microsoft Publisher, or you can Merge the Clients to an email Template for sending a Bulk Email.



### Merge to a Word Document

Click on the 'folder' button to select a document that you wish to merge you Clients to (if this is the first time you have performed a Mail Merge the System will use the provided sample Mail Merge Document)

Once you have selected the document you wish to perform a Mail Merge to, simply click the 'Merge' button and wait for the system to populate you selected document with your Clients names and addresses.

Microsoft Word will create a 'Form Letters' document that you can save to your computer for printing later or for your future reference.

### Save as CSV

To save a list of your Selected Clients to a csv file (csv files can be opened in Microsoft Excel, or can be used in a merge to a flyer or other documents in a



program such as Microsoft Publisher), simply click the 'Export to csv' button and enter a name and location to save the csv file to your computer.

## Merge to Email

This system includes the ability to perform a bulk Email to your Selected Clients, for accuracy please ensure the 'Must have Email?' checkbox is ticked when selecting your Merge criteria on the Mail Merge Screen.

**Note: before sending any bulk email it is always recommended that you send a test email to yourself first. See 'Test your Email Template' below.**

Before sending a bulk email for the first time you will need to go to the 'Settings' section at the top of the main screen and in the pop-up window select the 'Bulk Email' tab.

You must complete all the information requested on this screen to be able to perform bulk emails. To do this you will need to have an email account with an email hosting provider, or you web site hosts.

Please test the settings you have entered before attempting to send a Bulk Email, by pressing the 'Test Settings' button.

The screenshot shows a 'Settings' window with a blue title bar and standard window controls. The 'Bulk Email' tab is selected in the top navigation bar. The main content area has a light yellow background and contains the following elements:

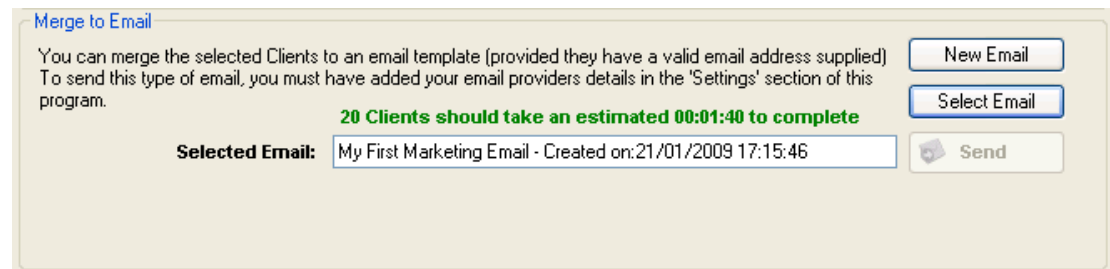
- A descriptive paragraph: "The Mail Merge feature of this program allows you to send Bulk Emails to a list of your selected Clients. To use this feature you will need an email provider, whose account details you must enter below. If you do not enter any information below you will not be able to send Bulk Emails."
- Four input fields: "SMTP Host:", "SMTP Username:", "SMTP Password:", and "Email Address:". To the right of these fields is an "Example:" section with the following text: "Host: smtp.yourhost.co.uk", "Username: login@yourhost.co.uk", "Password: yourpassword", and "Return Email: FromMe@yourhost.co.uk".
- A text prompt: "Enter a test Email below and click the 'Test Settings' button to send a test email to the address provided."
- A text input field with the placeholder "<Enter the Email address to send to here>" and a "Test Settings" button.
- An "Advanced Settings - Recommended to leave as default!" section with three settings: "Message Delay: 5" (with a spinner), "Block Size: 50" (with a spinner), and "Block Delay: 25" (with a spinner). Each setting has a descriptive text to its right: "This is the delay (in seconds) between each email.", "Split large merges into blocks of emails.", and "Delay (in seconds) between each block of emails." respectively.
- At the bottom right, there are "Save" and "Cancel" buttons.

**Note: Do Not reduce the delay settings, these are in place to prevent your emails being tagged as 'Spam' by your email provider!**

You will need to select an email template by clicking the 'Select Email' button (please follow the instructions below on creating an email template). Use the navigation at the top of the Email Templates screen to find the email template you would like to use and click the 'Select' button at the bottom of the screen.



When you have selected your template the system will estimate how long it will take to perform the Bulk Email, if you have entered the required information in the settings screen you will be able to click the 'Send' button, if it is greyed out (as below) you will need to enter the appropriate settings as detailed above.



The screenshot shows a web interface titled "Merge to Email". It contains the following elements:

- Text: "You can merge the selected Clients to an email template (provided they have a valid email address supplied). To send this type of email, you must have added your email providers details in the 'Settings' section of this program."
- Text: "20 Clients should take an estimated 00:01:40 to complete" (highlighted in green).
- Text: "Selected Email: My First Marketing Email - Created on: 21/01/2009 17:15:46" (displayed in a text box).
- Buttons: "New Email", "Select Email", and a greyed-out "Send" button.

**Note: To prevent your emails being tagged as Spam by your email provider, sending is performed in batches, with delays between each batch, to send hundreds of emails will take some time. Adding attachments to your template will increase sending time!**

## ***Email Templates***

To perform the Bulk Email you will need to set up one or more Email Templates, by clicking the 'New Email' button.

You must enter a useful name that will be entered into the Marketing Tab on the Clients Screen, after you perform your bulk email.

You can enter the contents of the email, including Subject, Body and email attachment, just like any email client.

You can Merge your Client data with the email by placing your cursor in either the Subject or Body and clicking one of the Merge Field buttons on the right of the screen.

**Email Templates**

New Delete Save First Prev 1 of 1 Next Last

Name: My First Marketing Email Created: 21 January 2009

Subject: Discount Voucher for our Loyal customers

Body:

Dear <ClientTitle> <ClientLast>

Thank you for being one of our most valued customers.

We have chosen you to receive our special 10% off Voucher for you to use any time in the next six months!

We look forward to serving you again.

Best Regards

A. Man  
Carpet Cleaning Company

Attachment:

You can insert the following merge fields anywhere in your Email's Subject or Body

Client Title

Client Initial

Client First Name

Client Last Name

Sending Bulk Emails with attachments can significantly increase the sending time of each email. You should ensure any attachment has been optimised or resized to reduce sending time.

Test Select Save Cancel

## Test your Email Template

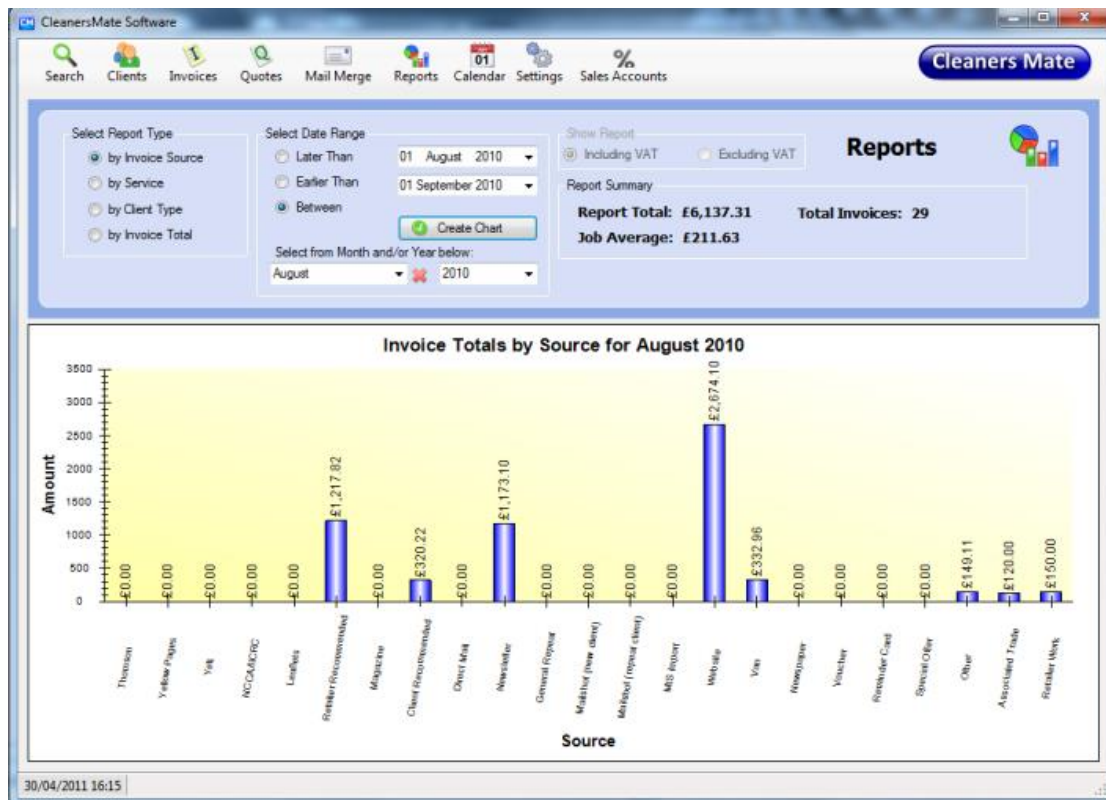
To test your email template before performing your Merge, please click the 'Save' button at the top of the screen (the bottom save button will close the screen) then press the 'Test' button at the bottom left of the screen, you will need to enter a valid email address so you can receive a copy of the email you are about to send.

## Reports



To access detailed charts click on the 'Reports' button on the top of the Main Screen.

You can select to view Reports for a given period, Month and or Year, and show the summed Invoice Amounts for the given Period organised by; Invoice Type, Service, Client Type and Invoice Total, by selecting the desired Report Type and Period and clicking the 'Create Chart' button.



## Print Reports

To print a report Right-Click on the chart after you have created it, to be presented with options allowing you to change the orientation of the print (portrait or landscape) to print the report, to save the report as an image, or to copy the report for pasting into other applications such as Microsoft Word.

## Settings



To access settings for this System please click the 'Settings' button at the top of the Main Screen.

## Your Details

This tab allows you to your business details, which will appear on the top of the Invoices you send.

**Settings**

Your Details | Logo | General | Invoices | Invoice Email | Quotes | Quote Email | Users | Import | Backup | Bulk Email

**Your Business Details**

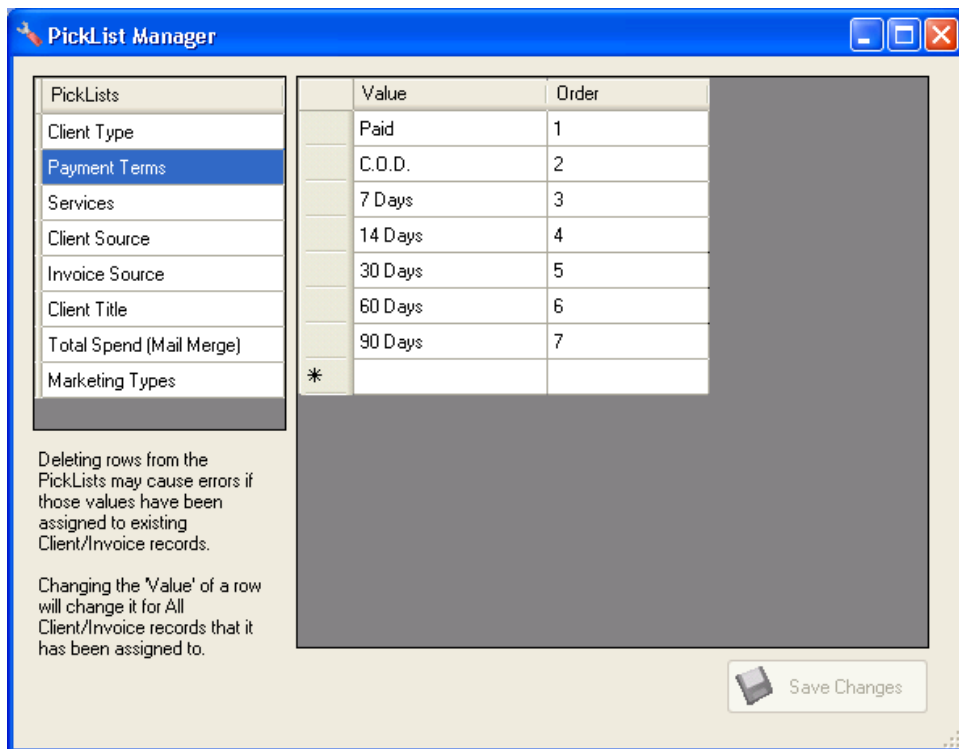
Business Name:	<input type="text" value="Your Business"/>	VAT Registered?:	<input type="checkbox"/>
Business Address:	<input type="text" value="Your Address"/>	Tax Percent:	<input type="text" value="17.5"/>
	<input type="text"/>		
Town:	<input type="text" value="Your Town"/>		
County:	<input type="text"/>		
Post Code:	<input type="text" value="UR2 10D"/>		
Tel:	<input type="text" value="0800 555 555"/>		
Fax:	<input type="text" value="08700 555 555"/>		
Email:	<input type="text" value="admin@your-business.co.uk"/>		

## Logo

You can personalise your version of this system by uploading your own image to replace the standard one that appears on the Main Screen of the software. For best fit resize your image to no larger than 775pixels high and 420 pixels wide. There is a further option to upload your company logo for your invoices and quotations. Please take note of the recommended sizes.

## General

The General tab allows you to edit the 'Picklist Items' used throughout the System. Wherever you see a dropdown list of items such as Client Title or Invoice Services, the list of items within it can be edited via this screen.



To edit an item in a dropdown box, select the relevant list on the left hand side and edit the data that appears in the list on the right.

To add a new item to the list click in the 'Starred' row and enter the relevant data.

To change the order that items appear in the dropdown boxes, alter the order numbers in each list to your satisfaction.

**Note: Deleting items from the lists, that have already been assigned to existing Clients or Invoices may cause errors in your data. You should change these values when you first start using the software to match your own business needs. To correct these errors will be at your own cost (should it be desired to be corrected).**

## ***Invoices and Quotes***

The Invoices and Quotes tabs contain the same options, except you can alter the settings for Invoices separately from Quotes.

Invoice and Quote settings that affect the way printed Invoices and Quotes are viewed can be altered in these tabs.

You can add a footer to your Invoice/Quote (that will appear at the bottom of every printed Invoice/Quote), common uses for this are for your VAT and Registered Company number, or your website address.

You can add a standard note (that will appear below the services on every printed Invoice/Quote), common uses for this are for any standard terms and conditions that apply to your Invoices.

There is a checkbox that will allow your printed Invoices to show an Amount Due of zero £0.00 if the payment terms for that Invoice are marked as 'Paid' Un-ticking this box will show the Amount Due even if the Terms are marked as 'Paid'. (This options is available for Invoices only)

**Settings**

Your Details | Logo | General | **Invoices** | Invoice Email | Quotes | Quote Email | Users | Import | Backup | Bulk Email

**Invoice Numbering**

Set the number you wish your Invoices to start from  
(If you do not want your Invoices to start at 1, enter a value here:)

1000

You can add a prefix to your Invoice Number  
(for display on printed Invoices)

**Invoice Settings**

Notes Text:  
Text to appear on the bottom left of all printed Invoices.

THANK YOU FOR YOUR CHOICE OF  
YOUR BUSINESSSERVICES. WE LOOK  
FORWARD TO SERVING YOU AGAIN IN THE  
FUTURE.

Terms & Conditions:  
Payment due no later than the terms specified from  
date of invoice. Late payment will incur a 10%

Invoice Footer: (2 lines only)  
Text to appear in the footer of all printed invoices.

VAT Number: 123456 Company No: 123456

**Invoice Amount Display**

Show Zero Amount on Printed invoice, if Terms are 'Paid': ☒

Save Cancel

## ***Invoice Email and Quote Email***

The Invoice Email and Quote Email tabs perform the same functions, except that you can alter the settings for Invoice Emails and Quote Emails separately.

These tabs allow you to alter the template for the default email that gets generated when sending your Invoice/Quotes via the 'Email' buttons on the Clients Screen.

There are standard merge fields available via the buttons across the bottom of the template that will insert the Merge Field at the current cursor location in either the Subject or Body of the Email.

**Settings**

Your Details | Logo | General | Invoices | **Invoice Email** | Quotes | Quote Email | Users | Import | Backup | Bulk Email

Enter the default values when sending an Invoice by email.  
You can insert values from this system using the buttons below.

Subject: Invoice <InvoiceNum> from <CompanyName>

Body: To <ClientName>  
Please see attached Invoice: <InvoiceNum> for your kind attention. Please feel free to contact us should you have any queries or concerns.  
Thank you.  
<CurrentUser>  
<UserPosition>

Invoice Number | Client Name | Business Name | Current User | Current User Position

Save | Cancel

## **Users**

This system can allow you to have different users logged on (only on the pc that it is installed on – this will not work on a network, across different pc's). The purpose of this is so that a different name and position can appear in the Merge fields of your Invoice and Quote emails.

If you add an additional user you will be prompted to select a user each time you use the System.

## **Import**

If you have your Client data stored in a spreadsheet, or can export them from another Contact Management system you can Import them into this System using the Import feature.

Please study the supplied sample Import document and format your data in the same way. You will need to include the field headers used in the sample import file, save your data as a csv file.

Select the csv file you have created with your Client information by clicking the 'Folder' button, the System will check the file for compatibility and inform you of any errors it finds. You will need to use the 'Last Row Imported' Information along with any Field Name specified in the error message to check the relevant row and field of your data.

If the data is checked 'Ok' then you can click the 'Save to Database' button to save your Client information to the System.

## Backup

It is recommended that you backup your data at least once a week, and it your responsibility to keep those backups in a safe place.

If you have backup software on your computer you can inform it to backup the 'Data' folder of this System, the default location of this folder is:

**'C:\Program Files\CleanPro\CleanersMate\Data'**

If you choose you can click the Backup button to create a copy of your database, this provides extra reliability of the System by allowing you to restore a dated copy of your Data should any data corruption occur.

Simply go to the 'Backup' tab in the settings, then it is advised to click 'save backup' to allow you to save your data to an outside source i.e. memory stick or external hard drive.

**Note: Data corruption can occur due to a number of reasons; system crashes, power outages, computer viruses etc. This system cannot guarantee that your data will not become corrupt, therefore we advise you perform regular backups of your System data.**

## Bulk Email

You must complete all the information requested on this screen to be able to perform bulk emails. To do this you will need to have an email account with an email hosting provider, or you web site hosts.

Please test the settings you have entered before attempting to send a Bulk Email, by pressing the 'Test Settings' button.

The Mail Merge feature of this program allows you to send Bulk Emails to a list of your selected Clients. To use this feature you will need an email provider, whose account details you must enter below. If you do not enter any information below you will not be able to send Bulk Emails.

SMTP Host:  Example:   
SMTP Username:  Host: smtp.yourhost.co.uk   
SMTP Password:  Username: login@yourhost.co.uk   
Email Address:  Password: yourpassword   
Return Email: FromMe@yourhost.co.uk

Enter a test Email below and click the 'Test Settings' button to send a test email to the address provided.

<Enter the Email address to send to here>

Advanced Settings - Recommended to leave as default!

Message Delay:  This is the delay (in seconds) between each email.   
Block Size:  Split large merges into blocks of emails.   
Block Delay:  Delay (in seconds) between each block of emails.

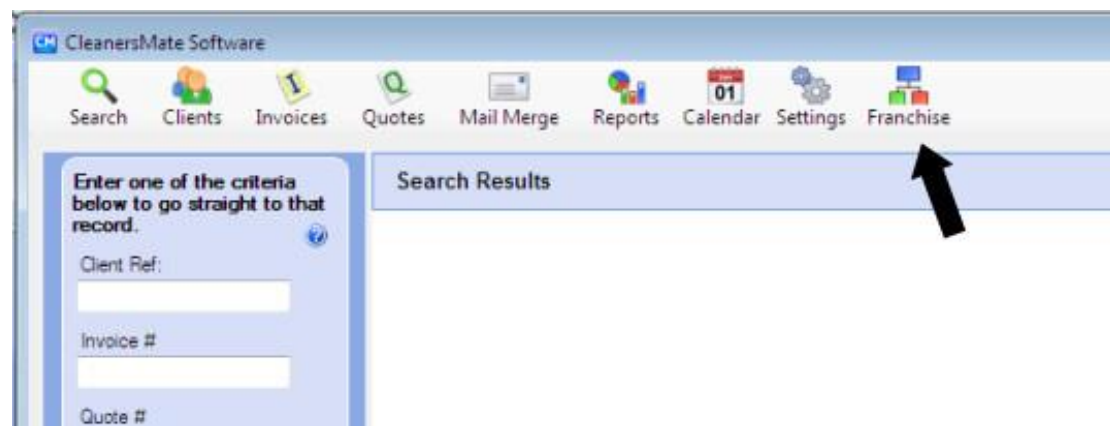


**Note: Do Not reduce the delay settings, these are in place to prevent your emails being tagged as 'Spam' by your email provider!**

### ***Franchise Version***

The franchise version allows you the franchisor to receive up to date information from all of your franchisees. This information which is easily sent by e mail, allows you to keep track of turnover for each month, exactly where the work is coming from, what services are being sold, average job values, client types etc and this is normally received on a monthly basis.

The franchisee needs to enter the section called Franchise, by clicking the button at the top (amongst the others).



This opens the following screen:

**Franchise - Invoice Summaries**

Select Invoices:  
☐ Later Than 01 March 2010  
☐ Earlier Than 31 March 2010  
☒ Between  
☐ None

Send as Email:  
 Email Address: admin@cleaning\_doctor.co.uk  
 Email Subject: Monthly Report

Save as CSV:  
 If you use webmail (Hotmail, Yahoo, Gmail etc.), or you wish to use the data in Excel or another application, then click the 'Export to CSV' button.

...or Select from Month and Year below:  
 Month: March Year: 2010

Clients with an Invoice date Between: '01/03/2010' and '31/03/2010'

InvoiceCreated	InvoiceNumber	clClientRef	plClientTypeValue	clBusinessName	plTitleValue	clClientFirst
02/03/2010 10:54	2978	001433	Commercial	Muland Heat Ltd		Julia
04/03/2010 11:03	2979	001434	Domestic		Mrs	B M
04/03/2010 11:10	2980	CM000034	Domestic		Mrs	
05/03/2010 11:23	2981	001435	Domestic		Mrs	Theresa
06/03/2010 11:29	2982	001436	Domestic		Mr	Jeffery
08/03/2010 11:44	2983	001437	Domestic		Mr	Peter
10/03/2010 15:07	2984	CM0000299	Domestic		Miss	
11/03/2010 15:17	2985	CM00001210	Domestic		Mrs	Jo
12/03/2010 15:31	2986	001438	Domestic		Mrs	Anna
09/03/2010 15:56	2987	001439	Domestic		Mrs	
15/03/2010 16:00	2988	CM0000120	Domestic		Mrs	
16/03/2010 16:02	2989	001439	Domestic		Mrs	
17/03/2010 14:33	2990	CM0000254	Domestic		Mrs	K
18/03/2010 14:44	2991	001440	Domestic		Mr	Guy
19/03/2010 14:50	2992	001441	Domestic		Mrs	Yvette

**24 Invoices Found**

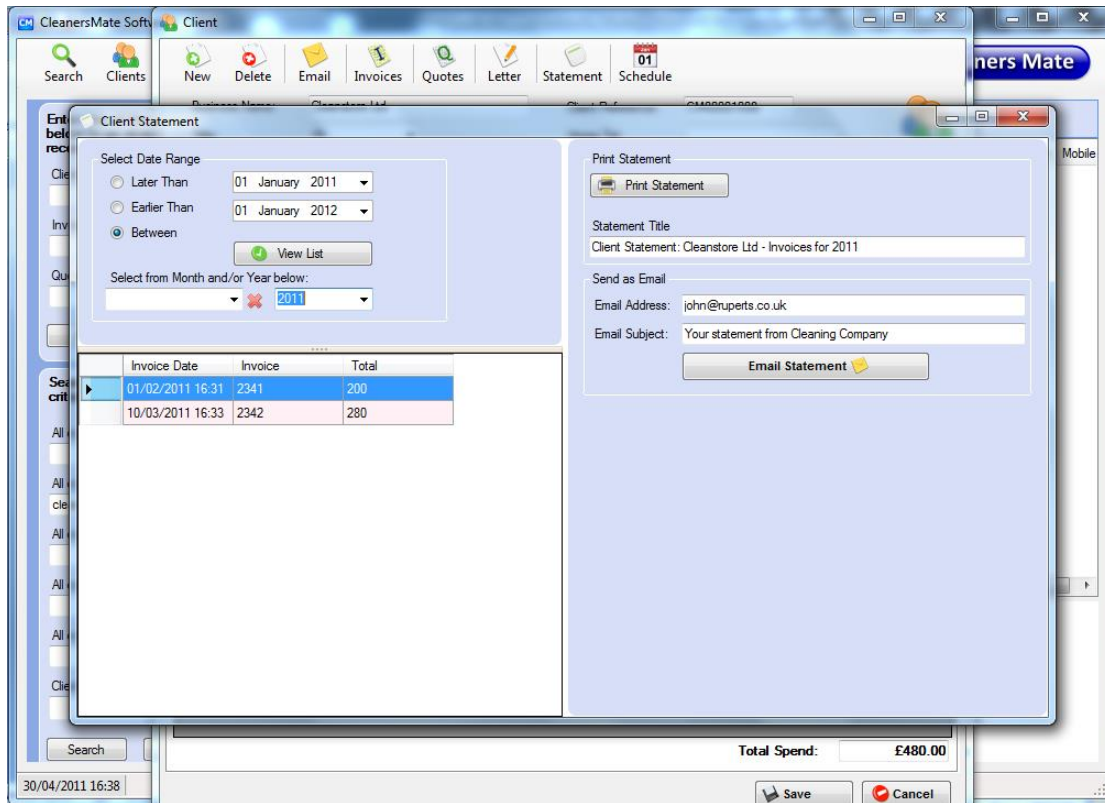
Show Totals:  
☒ Including VAT ☐ Excluding VAT  
 Average Job Value: £169.29 Total: £4,038.97

An e mail address for H.O. and a subject will need to be entered (this saves for all future reports and can be changed at any time). The franchisee now simply selects the month by the dropdown list (and year if needed), or by a date manually inputted if preferred, this then displays all the information populated in a list below.

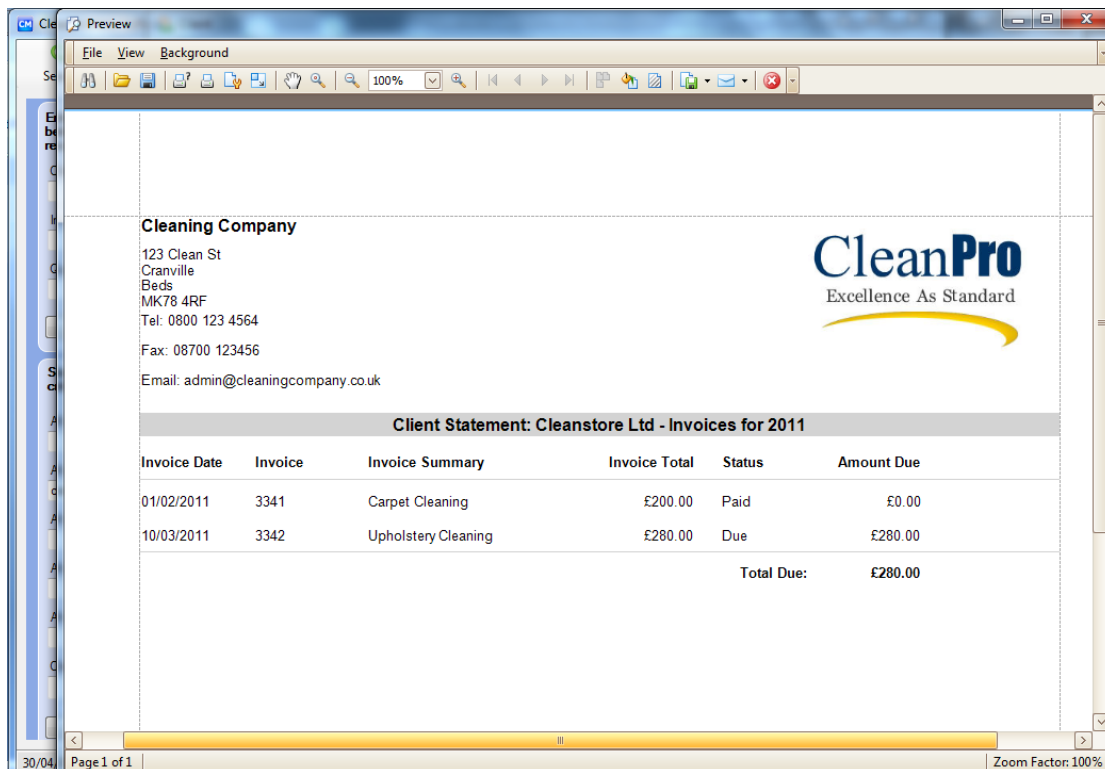
Now all they need to do is click the Email Invoice List. This will then send a file which is viewable by the receiver, in csv format (looks like Excel).

## Client Statements

The statement facility allows you to collate up to date history of clients invoices. In the client screen click the statement button which opens up the date range screen:

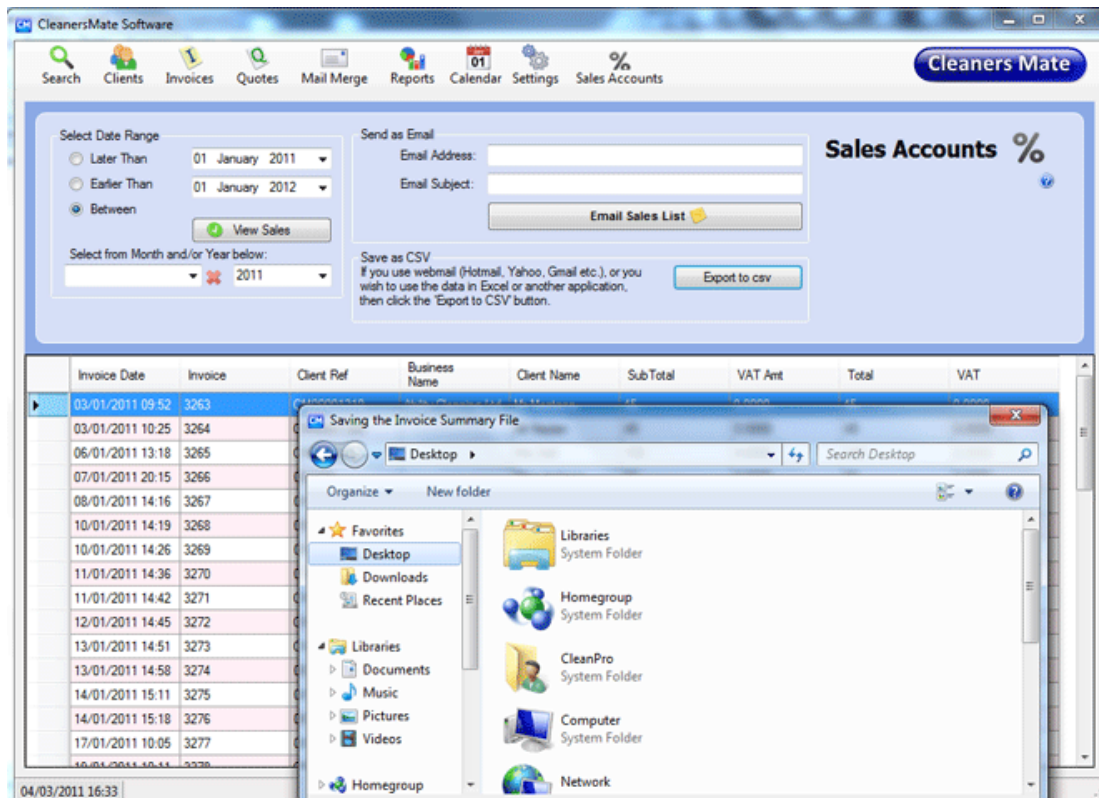


You can select anything from a day to a year simply by selecting the date range, or if desired select a month and a year – or just a year. Fill in the e mail details and click send (you will need an e mail client to do this (hotmail, gmail etc is not an e mail client as they are web based)). When you send it by e mail the recipient will receive it in pdf format. Alternatively you can select print to print a paper based version.



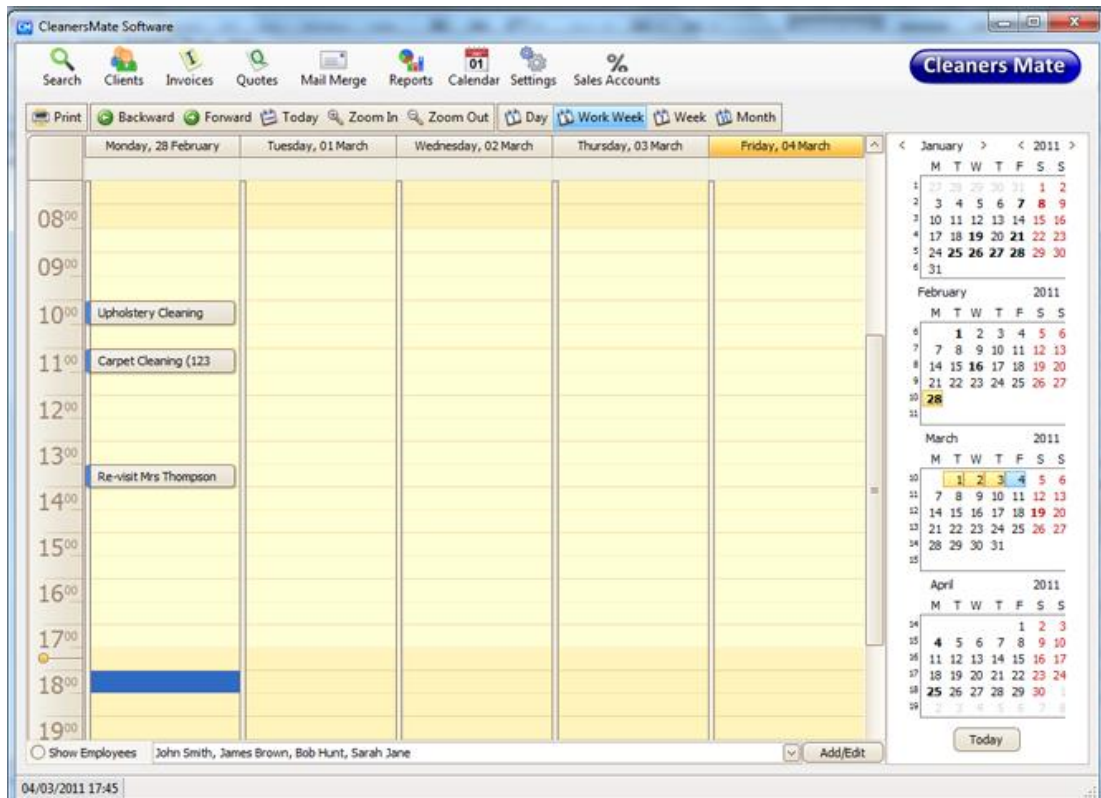
## Sales Accounts

This allows you to send your sales accounts details to your accountant in quick time. In the sales accounts screen, select the date range required, fill in the e mail recipient (it stays there for future sends, until you change it manually) and click 'e mail sales list'. This will be sent in csv format so that your accountant can utilise the information in a spreadsheet format. You will need an e mail client to send this by e mail. Alternatively if you use hotmail, gmail etc, you can export this information to a csv file (just like Excel) to save to your desktop and e mail it that way.

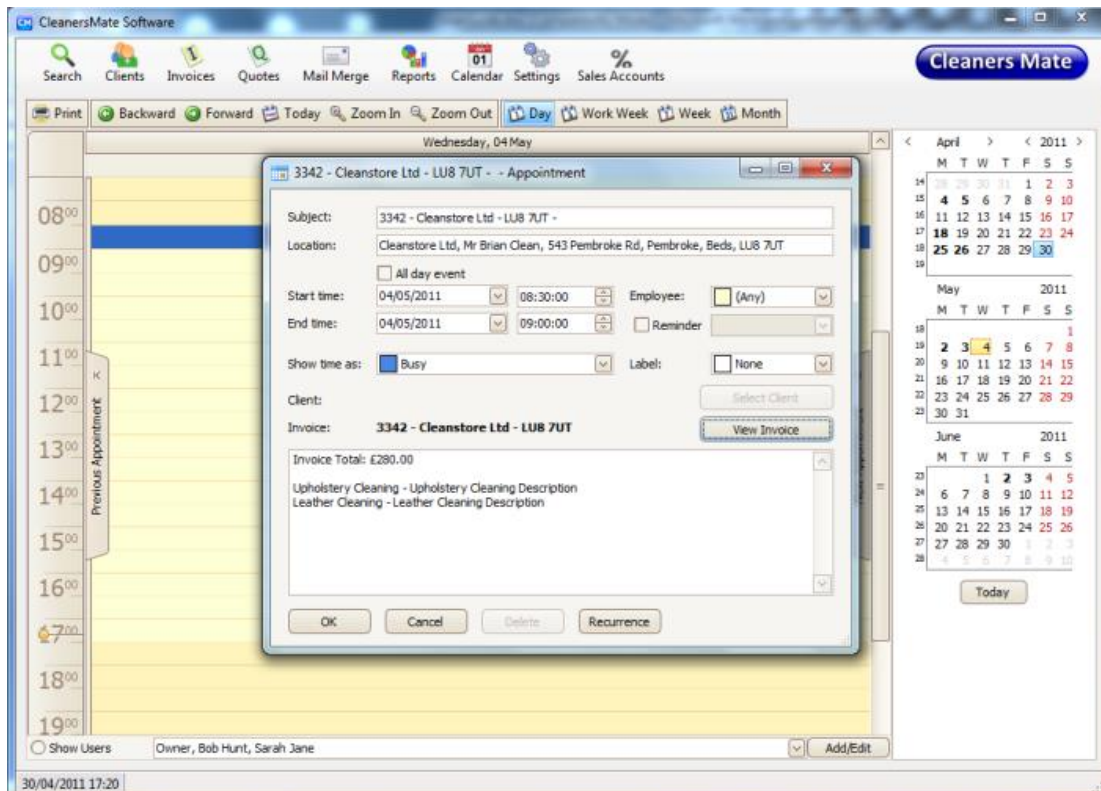


## Appointments / Diary

View the appointments by selecting either 'day', 'work week', 'week' or 'month'. Work week means Mon to Fri. To create an appointment double click the line next to the time slot, this will bring up a smaller screen.



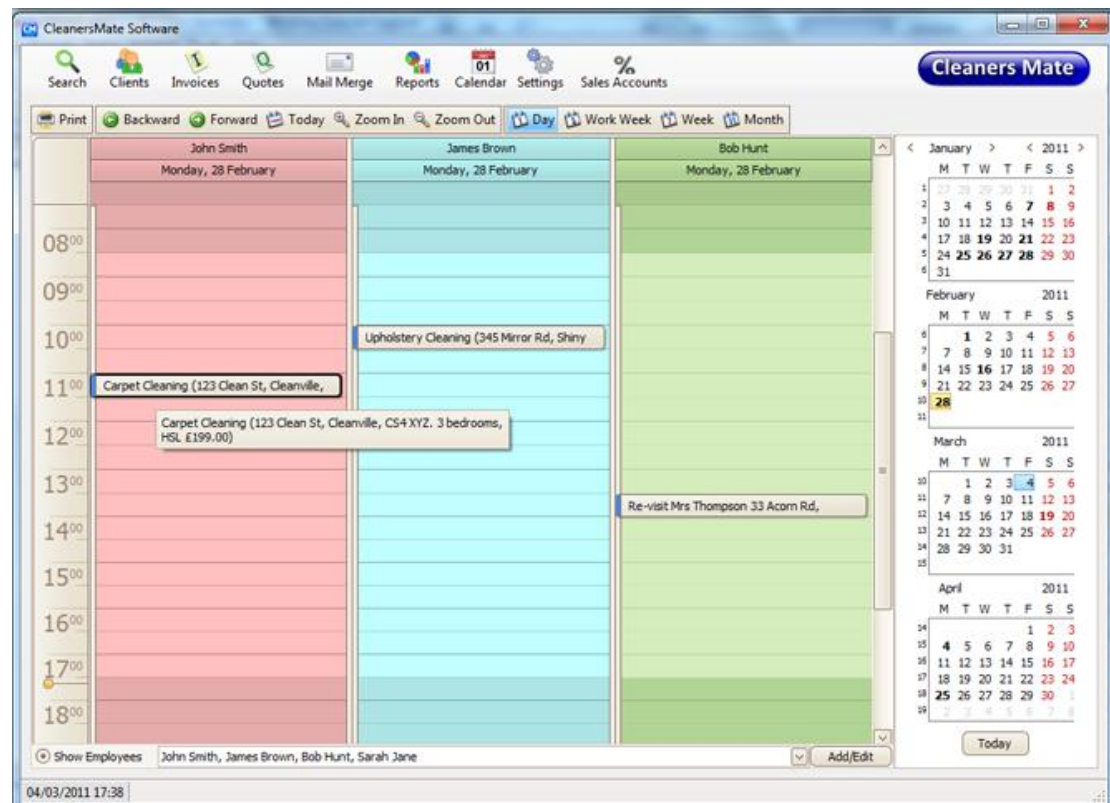
You can either enter manually in the 'subject' and 'location' lines. Alternatively click 'select client' to enter their details automatically, or 'select invoice/quote'. This will allow you to browse for the invoice or quote – which then enters all information including what work is to be carried out, as well as price to charge the client.





To print off a daily worksheet, simply click the print button, you can then select what view (we would recommend 'day view') to show the page to be printed.

If you have other staff that want their own appointments (that wont clash with other users), then at the bottom of the screen click 'show users'. Then click 'add/edit' This allows you to add other staff and customise their colour code scheme for easy reference.



## **QuoteMASTER**

The QuoteMASTER system allows users to carry out in-home quotations with different packages to offer clients – thus increasing job ticket values. It also allows users to offer maintenance plans. All packages and plans are fully editable and customisable. For an in depth tutorial please log on to: [www.cleanersmate.co.uk/carpet\\_cleaning\\_software\\_tutorials.htm](http://www.cleanersmate.co.uk/carpet_cleaning_software_tutorials.htm) and scroll to 'Latest Features Tutorials'.

## **Text Marketer**

This allows the user to send texts either individually or by bulk – using the filter system in Marketing. A simple sign up with [www.textlocal.com](http://www.textlocal.com) is required. Please use this link to see how it works [www.cleanersmate.co.uk/cleaners\\_marketing\\_software.htm#Text\\_Marketing](http://www.cleanersmate.co.uk/cleaners_marketing_software.htm#Text_Marketing)